



Report on Palm Beach County Tourism Second Quarter 2006 (April, May and June)

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Introduction: 2nd Quarter 2006

Background

- The following report contains information collected during the 2nd Quarter of 2006 (April, May and June 2006), the third quarter of Fiscal Year 2005/2006.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



Property Manager Survey: 2nd Quarter 2006

Occupancy Rates

- **In the second quarter of 2006, the average occupancy rate for Palm Beach County surveyed hotels was 71.0%. This is at parity with the average occupancy rate in the second quarter of 2005 (72.7%) and is 13.7 percentage points lower than the average occupancy rate in the previous quarter (84.7%).**
 - As the months progressed during 2Q2006, the occupancy rate decreased steadily from 73.6% in April to 70.8% in May to 68.9% in June, as would be expected.
 - Compared to the same quarter last year, there was a slight increase in the average occupancy rate among smaller properties (50-100 rooms, from 66.7% in 2Q2005 to 69.3% in 2Q2006, a 2.6 percentage point increase) and a comparable decrease among larger properties (100+ rooms, from 73.8% to 71.3%, a 2.5 percentage point decrease).
- **Hotels in the Northern region reported the highest average occupancy rate (73.1%) during 2Q2006, while hotels in the Southern and Central regions reported comparable average occupancy rates (70.5% Southern and 70.6% Central).**
 - Compared to 2Q2005, there was a 4.9 percentage point decrease in the average occupancy rate among properties in the Central region (from 75.5% to 70.6%). Occupancy rates among properties in Northern (73.1%) and Southern (70.5%) regions in 2Q2006 were comparable with those in 2Q2005 (71.3% Northern, 70.8% Southern).
 - All regions reported decreases in occupancy rates compared to last quarter.
- **The estimated number of Palm Beach County hotel room nights occupied* in the second quarter of 2006 was 964,792 – a decrease of 4,228 room nights compared to 2Q2005 (969,020) and a decrease of 173,643 room nights compared to last quarter (1,138,435).**
- **The average percentage of international guests staying at Palm Beach County hotels during the second quarter of 2006 was 2.8%, lower than in the last quarter (4.5%).**
 - Smaller hotels (50-100 rooms) reported that 3.6% of guests were traveling internationally, while larger properties (101 + rooms) reported that 2.6% came from countries other than the US.
 - Among larger properties, the percentage of international guests was 2.8% in properties with 101-219 rooms and 1.2% in properties with 220-500 rooms.
 - According to hotels that responded, properties in the Southern region had the highest percentage of international guests (3.9%), Northern the fewest (1.2%).
- **In terms of the purpose of the visit, according to participating property managers, 37.5% of hotels guests were leisure travelers, 32.0% were business travelers and 30.5% were convention/group travelers.**
- **During 2Q2006, conference/convention bookings accounted for more than one-third of occupied room nights at designated convention hotels (36.1%). This is comparable to 2Q2005 (37.9%) and represents an increase of 5.6 percentage points compared to last quarter (30.5%).**

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

Average Daily Room Rate (ADR)

- **The ADR reported by participating Palm Beach County property managers in the second quarter of 2006 was \$142.96 – this is comparable with the second quarter of 2005 (\$143.81) but represents a 30.0% decrease compared to last quarter (\$204.12).**
 - Smaller properties (50-100 rooms) reported a 6.5% decrease in ADR compared to the same quarter last year (from \$117.22 to \$125.42) and a 28.9% decrease compared to the last quarter (\$164.79). Larger properties had comparable ADR's in 2Q2006 (\$146.99) and 2Q2005 (\$146.79), but reported a 30.4% decrease in ADR compared to the previous quarter (\$211.07).
 - Among larger properties, hotels with 101-219 rooms reported an ADR of \$101.80 (a 9.5% decrease from 2Q2005, \$112.43) and hotels with 220-500 rooms reported an ADR of \$159.02 (a 5.9% increase from 2Q2005, \$150.23). Hotels with 101-219 rooms and hotels with 220-500 rooms reported decreases in ADR compared to last quarter (34.1%, hotels with 101-219 rooms and 27.9%, hotels with 220-500 rooms).

Future Business Outlook

- **In 2Q2006, 37.7% of surveyed property managers expected a decrease in room revenue compared to the same months last year, while 35.1% predicted an increase. The remaining 27.2% expected no change in room revenue compared to the previous year.**
 - Among hotel managers who predicted an increase in room revenue compared to the previous year, the average increase expected was 10.0%.
 - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected was 10.9%.

Bookings Via Third Party Websites

- **The percentage of hotel reservations sold through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the second quarter of 2006 (13.5%) was at parity with 2Q2005 (12.9%) and slightly higher than the previous quarter (11.1%).**
 - The average percent of bookings sold via third party websites in smaller (50-100 rooms) and larger properties (101+ rooms) was about the same in 2Q2006 (12.4% among smaller properties and 12.6% among larger properties).



Hotel Visitor Survey: 2nd Quarter 2006

Characteristics of Stay

- The average party size in 2Q2006 was 2.2, at parity with the same quarter last year (2.1), and last quarter (2.1). The median party size for the quarter, as well as for each month within the quarter was 2.0.
- Hotel guests stayed an average of 3.4 nights in a hotel and occupied an average of 1.4 rooms per night*.
- **Most surveyed visitors reported that they were in Palm Beach County on a business trip (conference/convention/business meeting, 63.3%). Leisure travelers comprised 31.5% of surveyed visitors.**
 - While the percentage of business travelers increased during the course of the quarter (from 59.2% in April to 62.4% in May to 71.3% in June), the percentage of leisure travelers decreased steadily from 36.4% in April to 33.2% in May to 22.0% in June.
 - The percentages of business and leisure travelers in 2Q2006 were at parity with the same time last year (61.3% business, 30.8% leisure). However, compared to the last quarter, the percentage of business travelers increased by 7.9 percentage points (from 55.4% to 63.3%), while the percentage of leisure visitors decreased by 4.8 percentage points (from 36.3% to 31.5%).

Planning the Trip to Palm Beach County

- **In 2Q2006, most surveyed visitors reported that they selected PBC over other destinations due to a work related trip (61.6%). Other popular answers were 'visit friends/relatives' (19.1%), 'previous visit' (8.6%) and/or a 'weather' (8.6%).**
 - The percentage of those who mentioned 'work related trip' in 2Q2006 was about the same as in 2Q2005 (61.3%) and 5.7 percentage points higher than in 1Q2006 (55.9%).
- **The percentage of short term planners in 2Q2006 (planned the trip one month or less in advance, 56.6%) increased by 4.0 percentage points compared to the same quarter last year (52.6%) and by 6.0 percentage points compared to last quarter (50.6%).**
- Consistent with the percentage of business travelers, most surveyed visitors (62.7%) reported that their employer made the decision about the trip to PBC. This represents a 10.3 percentage point increase compared to 2Q2005 (52.4%) and a 7.8 percentage point increase compared to 1Q2006 (54.9%).

Booking a Trip to Palm Beach County

- **One-quarter of surveyed visitors claimed to have used a Travel Agent (25.6%) to book part of their trip to PBC in 2Q2006. This is 3.9 percentage points higher than in 2Q2005 (21.7%) and is comparable to last quarter (26.1%).**

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Visitor Survey: 2nd Quarter 2006

Booking a Trip to Palm Beach County (Continued)

- **Use of the Internet among surveyed visitors to book any part of their trip to PBC was at 46.0% - small increases of 2.3 and 2.1 percentage points compared to 2Q2005 (43.7%) and 1Q2006 (44.1%), respectively.**
 - Among those hotel guests who used the Internet to book part of their trip to PBC, 74.2% used it to book airfare, 61.3% used it to make hotel rooms reservations and 40.3% used it to rent a car.
 - Those who used the Internet to book their hotel room were most inclined to have used the hotel's website (27.6%), followed by Expedia.com (4.2%).
 - Only 10.1% of respondents cited that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meal, rental car, etc). This is about the same as in 2Q2005 (11.7%) and 1Q2006 (10.3%).
 - 2Q2006 surveyed visitors were more likely to have used an airplane to come to PBC (80.1%) than visitors surveyed in 2Q2005 (72.8%, an increase of 7.3 percentage points).

Visitor Expenditures

- **In 2Q2006, surveyed visitors' average per party* expenditure in Palm Beach County was \$1,455 – at parity with the second quarter of last year (\$1,473) and \$996 less (40.6% decrease) than the average per party expenditure last quarter (\$2,451).**
 - Compared to 2Q2005, only lodging expenditures experienced an increase in 2Q2006 (from \$636 in 2Q2005 to \$826 in 2Q2006, 29.9%). All spending categories experienced decreases compared to last quarter.
 - The average per person expenditure in 2Q2006 was \$661 representing a decrease compared to both 2Q2005 (\$701, a 5.7% decrease) and 1Q2006 (\$1,167, a 43.4% decrease).
- **Vacationers spent, on average, \$1,993 per party, while business travelers' per party average expenditure was \$1,169.**
 - Compared to last quarter, business and leisure per party expenditures decreased by 39.9% and 33.5%, respectively (from \$3,318 to \$1,993, leisure travelers and from \$1,758 to \$1,169, business travelers).
 - As compared to 2Q2005, business travelers' per party expenditure did not change significantly (\$1,178 in 2005 and \$1,169 in 2006), while leisure travelers' per party expenditure had a slight decrease of 2.2% (from \$2,037 to \$1,993).

Characteristics of Visit

- **First time visitors to Palm Beach County made up 26.9% of surveyed hotel guests. This is at parity with 2Q2005 (27.2%) and 1Q2006 (26.7%).**

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Visitor Survey: 2nd Quarter 2006

Characteristics of Visit (Continued)

- **Eighty-two percent of surveyed hotel guests plan to visit Palm Beach County again in the future.**
 - Among those who said they will return to Palm Beach County, 64.9% plan to do so in the next year; 30.4% within the next three months.
 - Among those who said they will not come back to PBC (3.1%), the two most frequently mentioned reasons were 'going to other places/I like changing destinations' (24.1%) and 'no business in the area' (23.3%). Forty-two point nine percent did not provide a reason for not coming back.
- Fifty-eight point five percent of respondents claimed that the rising cost of fuel/transportation would not affect their decision to come to Palm Beach County (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). This represents a decrease of 4.4 percentage points from 1Q2006 (62.9%).
- More than one-half (53.2%) of surveyed respondents stated that the generally increasing costs of transportation would not influence their decision to come to PBC (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). (Question asked only in May and June)
- **While visiting Palm Beach County during the second quarter of 2006, the vast majority of surveyed visitors ate at area restaurants (93.0%).**
 - Other popular activities enjoyed by visitors were shopping (33.5%), going to the beach (30.7%) and swimming (24.2%).

Attitudes toward Palm Beach County

- **As seen in previous quarters, the aspects of the trip to PBC that visitors appreciated the most were 'climate/weather' (35.1%), 'beaches' (12.3%) and 'beautiful area' (6.0%).**
 - The percentage of those who mentioned 'climate/weather' had a considerable decrease compared to last quarter (from 49.5% to 35.1%, a 14.4 percentage point decrease), but did not vary substantially compared to the same quarter last year (36.1%).
- **2Q2006 hotel guests mentioned 'traffic/bad drivers' most often when asked what they liked least about their trip to Palm Beach County (36.5%). 'Humidity/poor weather' was the second most mentioned aspect at 19.0%.**
 - The percentage of those who mentioned 'traffic/bad drivers' increased by 3.6 percentage points compared to 2Q2005 (32.9%) and decreased by 3.7 percentage points compared to last quarter (40.2%).
- In 2Q2006, surveyed visitors continued to report that a 'longer stay' (21.2%), 'better weather' (11.4%) and 'traffic improvements/finish construction on I-95' (11.3%) would make their next trip to PBC better.

Characteristics of Visitors

- Nine-in-ten surveyed respondents considered themselves as White/Caucasian (91.8%), six-in-ten (60.2%) claimed to have professional/managerial jobs, and almost two-thirds (64.7%) said that they have an annual household income of \$100,000 or greater.
- In 2Q2006, 'adult family member/friends' were cited most often as surveyed visitors' traveling companions. One-third of surveyed visitors were traveling alone.
- The vast majority of surveyed guests were domestic travelers (90.8%).



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Property Manager Survey



Methodology

Property Manager Survey

Each month, self-administered surveys are completed by hotel Property Managers throughout Palm Beach County.

The occupancy rate is derived by weighting the responding occupied room nights by the available room nights* in Palm Beach County.

The product of the average daily room rate for each hotel size category and the occupied room nights in the county for each corresponding category equals lodging revenues per size category. The addition of all the individual lodging revenue equals total lodging revenue for the county.

The average daily room rate (ADR) is computed by dividing the total lodging revenue by the occupied room nights in the county*.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

| | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--|------------------|-----------|-----------|-----------|------------------|------------------|------------------|------------------|
| Occupancy Rate | | | | | | | | |
| Month/Quarter | 71.0% | 73.6% | 70.8% | 68.9% | 72.7% | 63.0% | 73.1% | 84.7% |
| FYTD (Oct. - Set.) | 76.0% | 77.7% | 76.9% | 76.0% | 80.2% | 76.0% | 72.4% | 78.4% |
| Room Nights Occupied^{1*} | | | | | | | | |
| Month/Quarter | 964,792 | 329,102 | 327,376 | 308,314 | 969,020+ | 862,035+ | 956,948+ | 1,138,435 |
| FYTD (Oct. - Set.) | 3,060,175 | 2,424,485 | 2,751,861 | 3,060,175 | 3,195,241+ | 4,057,276+ | 956,948+ | 2,095,383 |
| Percentage of Room Nights Occupied | | | | | | | | |
| Leisure | 37.5% | 38.2% | 35.1% | 39.0% | 35.0% | 36.2% | 35.4% | 40.4% |
| Business | 32.0% | 32.2% | 33.1% | 30.6% | 34.7% | 37.8% | 34.7% | 34.5% |
| Convention/Group | 30.5% | 29.6% | 31.8% | 30.4% | 30.3% | 26.0% | 30.0% | 25.2% |
| Average Daily Room Rate² | \$142.96 | \$175.00 | \$135.32 | \$115.79 | \$143.81 | \$107.76 | \$137.81 | \$204.12 |

+ Room nights unavailable due to hurricane/renovation closures are excluded.

1. Room nights occupied = ((# total rooms*occupancy) * (# of room nights per month/quarter))

2. ADR = Average rate per occupied room.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

| Occupancy Rate Trends by Month, Quarter, and Fiscal Year | <u>98/99</u> | <u>99/00</u> | <u>00/01</u> | <u>01/02</u> | <u>02/03</u> | <u>03/04</u> | <u>04/05</u> | <u>05/06</u> |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 2nd Quarter (April/May/June) | N/A | N/A | N/A | 65.1 | 67.0 | 71.8 | 72.7 | 71.0 |
| April | 72.5 | 71.9 | 71.9 | 71.1 | 72.0 | 79.7 | 79.1 | 73.6 |
| May | 66.5 | 67.9 | 65.8 | 62.9 | 65.6 | 67.5 | 68.5 | 70.8 |
| June | 60.7 | 63.0 | 63.2 | 61.1 | 63.7 | 67.7 | 70.0 | 68.9 |
| 3rd Quarter (July/August/Sept.) | N/A | N/A | N/A | 57.3 | 57.8 | 64.2 | 63.0 | - |
| 4th Quarter (Oct/Nov/Dec) | N/A | N/A | N/A | 57.5 | 59.8 | 64.2 | 79.8 | 73.1 |
| 1st Quarter (Jan/Feb/Mar) | N/A | N/A | N/A | 76.2 | 77.9 | 83.8 | 88.3 | 84.7 |
| Fiscal YTD (Oct. – Sept.) | 66.7 | 68.8 | 67.3 | 64.1 | 65.7 | 70.9 | 76.0 | 76.0 |
| Number of Room Nights Occupied in 2nd Quarter* | | | | | | | 969,020+ | 964,792 |

+ Room nights unavailable due to hurricane/renovation closures are excluded.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

| | <u>Total 2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | <u>Total 2Q 2005</u> | <u>Total 3Q 2005</u> | <u>Total 4Q 2005</u> | <u>Total 1Q 2006</u> |
|---|--------------------------|--------------|------------|-------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Conference/Convention Bookings | | | | | | | | |
| <u>All Hotels</u> | | | | | | | | |
| % Occupied Room Nights in County | 30.5% | 29.6% | 31.8% | 30.4% | 30.3% | 26.0% | 30.0% | 25.2% |
| Occupied Room Nights in County | 299,502 | 97,414 | 108,361 | 93,727 | 295,390 | 243,936 | 302,473 | 291,689 |
| Occupied Room Nights in County FYTD (Oct.- Sept.) | 893,664 | 691,576 | 799,937 | 893,664 | 889,351 | 1,133,287 | 302,473 | 594,162 |
| <u>Convention Hotels</u> | | | | | | | | |
| % Occupied Room Nights | 36.1% | 34.0% | 36.5% | 38.1% | 37.9% | 30.9% | 35.4% | 30.5% |
| Occupied Room Nights | 213,971 | 69,754 | 72,318 | 71,899 | 185,481 | 134,005 | 157,068 | 213,289 |
| Occupied Room Nights FYTD (Oct.- Sept.) | 584,328 | 440,111 | 512,429 | 584,328 | 535,995 | 670,000 | 157,068 | 370,357 |
| Available Inventory* | | | | | | | | |
| Rooms in County | 44,737 | 14,905 | 14,916 | 14,916 | 44,083+ | 44,499+ | 43,083+ | 45,020 |
| Room Nights | 1,357,026 | 447,150 | 462,396 | 447,480 | 1,337,086+ | 1,364,636+ | 1,321,198+ | 1,350,518 |
| Room Nights FYTD (Oct.- Sept.) | 4,028,742 | 3,118,866 | 3,581,262 | 4,028,742 | 3,988,266+ | 5,352,902+ | 1,321,198+ | 2,671,716 |
| Response Rate | | | | | | | | |
| Month/Quarter (for all hotels in County) | 60.0% | 62.1% | 57.3% | 60.6% | 63.1% | 62.9% | 55.1% | 59.7% |
| FYTD (Oct.- Sept.) | 58.3% | 58.1% | 58.0% | 58.3% | 65.8% | 65.1% | 55.1% | 57.4% |

+ Room nights unavailable due to hurricane/renovation closures are excluded.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

| Occupancy Rate | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--------------------------|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Size of Hotel | | | | | | | | |
| 50 - 100 Rooms | 69.3% | 75.3% | 71.7% | 63.6% | 66.7% | 63.5% | 75.7% | 88.1% |
| 101 + Rooms | 71.3% | 73.3% | 70.6% | 69.8% | 73.8% | 63.1% | 72.6% | 84.1% |
| 101-219 | 68.2% | 69.8% | 67.8% | 67.0% | 73.1% | 66.0% | 75.7% | 84.5% |
| 220-500 | 76.9% | 79.1% | 76.8% | 74.6% | 73.7% | 58.6% | 70.1% | 82.4% |
| All Properties | 71.0% | 73.6% | 70.8% | 68.9% | 72.7% | 63.0% | 73.1% | 84.7% |
| Geographic Region | | | | | | | | |
| North | 73.1% | 77.2% | 69.6% | 71.0% | 71.3% | 61.3% | 73.8% | 83.4% |
| Central | 70.6% | 71.3% | 70.5% | 70.5% | 75.5% | 68.2% | 74.3% | 84.5% |
| South | 70.5% | 73.7% | 71.6% | 66.6% | 70.8% | 58.7% | 71.5% | 85.6% |

| What percent of your occupancy is international? | Total 2Q 2006 | April. | May | June | Total 2Q 2005 | Total 3Q 2005 Aug/Sep | Total 4Q 2005 | Total 1Q 2006 |
|--|---------------|--------|------|------|---------------|-----------------------|---------------|---------------|
| Size of Hotel | | | | | | | | |
| 50-100 Rooms | 3.6% | 2.8% | 3.9% | 3.6% | N/A | 6.8% | 1.9% | 11.5% |
| 101 + Rooms | 2.6% | 2.0% | 2.7% | 3.0% | N/A | 4.7% | 2.6% | 3.1% |
| 101-219 | 2.8% | 1.0% | 2.9% | 4.1% | N/A | 8.1% | 3.4% | 4.0% |
| 220-500 | 1.2% | 1.6% | 1.5% | 0.7% | N/A | 0.5% | 0.8% | 1.5% |
| All Properties | 2.8% | 2.4% | 3.1% | 3.0% | N/A | 5.1% | 2.7% | 4.5% |
| Geographic Region | | | | | | | | |
| North | 1.2% | 1.1% | 1.5% | 1.0% | N/A | 2.4% | 1.4% | 1.4% |
| Central | 2.6% | 2.5% | 3.0% | 2.4% | N/A | 3.2% | 2.2% | 5.2% |
| South | 3.9% | 2.9% | 4.3% | 4.7% | N/A | 8.0% | 3.8% | 5.7% |



Property Manager Survey: 2nd Quarter 2006

| Average Daily Room Rate | Total <u>2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | Total <u>2Q 2005</u> | Total <u>3Q 2005</u> | Total <u>4Q 2005</u> | Total <u>1Q 2006</u> |
|-----------------------------|----------------------|--------------|------------|-------------|----------------------|----------------------|----------------------|----------------------|
| <u>Size of Hotel</u> | | | | | | | | |
| <u>50 - 100 Rooms</u> | \$117.22 | \$136.75 | \$120.91 | \$99.29 | \$125.42 | \$103.02 | \$119.38 | \$164.79 |
| <u>101 + Rooms</u> | \$146.99 | \$180.93 | \$137.78 | \$118.39 | \$146.79 | \$108.85 | \$141.57 | \$211.07 |
| 101-219 | \$101.80 | \$120.47 | \$93.28 | \$88.80 | \$112.43 | \$91.61 | \$109.19 | \$154.43 |
| 220-500 | \$159.02 | \$187.97 | \$159.89 | \$121.18 | \$150.23 | \$107.56 | \$147.65 | \$220.64 |
| <u>All Properties</u> | \$142.96 | \$175.00 | \$135.32 | \$115.79 | \$143.81 | \$107.76 | \$137.81 | \$204.12 |



Property Manager Survey: 2nd Quarter 2006

| Occupied Room Nights * | <u>Occupied Room Nights</u> | <u>% Change</u> |
|------------------------------|-----------------------------|-----------------|
| 2Q | | |
| 2004 | 1,022,634 | |
| 2005 | 969,020+ | - 5.2 |
| 2006 | 964,792 | - 0.4 |
| April | | |
| 2004 | 376,463 | |
| 2005 | 346,363+ | - 8.0 |
| 2006 | 329,102 | - 5.0 |
| May | | |
| 2004 | 328,502 | |
| 2005 | 309,946+ | - 5.6 |
| 2006 | 327,376 | 5.6 |
| June | | |
| 2004 | 317,669 | |
| 2005 | 312,711+ | - 1.6 |
| 2006 | 308,314 | - 1.4 |
| 3Q | | |
| 2004 | 859,630 | |
| 2005 | 862,035+ | 0.3 |
| 2006 | | |
| 4Q | | |
| 2004 | 1,052,362+ | |
| 2005 | 956,948+ | - 9.1 |
| 2006 | | |
| 1Q | | |
| 2004 | 1,186,693 | |
| 2005 | 1,173,859+ | - 1.1 |
| 2006 | 1,138,435 | - 3.0 |
| FYTD (October – June) | | |
| 2004 | 3,143,382 | |
| 2005 | 3,195,241+ | 1.6 |
| 2006 | 3,060,175 | - 4.2 |

+ Room nights unavailable due to hurricane/renovation closures are excluded.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 2nd Quarter 2006

| Future Business Outlook (for each month as compared to the same month in previous year) | <u>Total Room Revenue</u> | <u>Group/Indiv. Business Room Revenue</u> | <u>Individual Vacation Room Revenue</u> |
|---|-------------------------------|---|---|
| May 2006 / June 2006 predictions from April | | | |
| Foresee Decrease | 34.8% | 42.1% | 24.9% |
| Average decrease (among those who foresee decrease) | 14.7% | 10.8% | 9.7% |
| Foresee No Change | 26.6% | 24.7% | 44.9% |
| Foresee Increase | 38.6% | 33.1% | 30.2% |
| Average increase (among those who foresee increase) | 10.9% | 8.0% | 6.1% |
| June 2006 / July 2006 predictions from May | | | |
| Foresee Decrease | 36.8% | 35.6% | 31.0% |
| Average decrease (among those who foresee decrease) | 8.4% | 9.4% | 6.2% |
| Foresee No Change | 26.1% | 27.0% | 37.1% |
| Foresee Increase | 37.1% | 37.5% | 31.9% |
| Average increase (among those who foresee increase) | 8.8% | 8.7% | 9.9% |
| July 2006 / August 2006 predictions from June | | | |
| Foresee Decrease | 40.3% | 32.4% | 36.6% |
| Average decrease (among those who foresee decrease) | 9.3% | 7.3% | 7.4% |
| Foresee No Change | 30.1% | 36.7% | 32.5% |
| Foresee Increase | 29.6% | 30.9% | 30.9% |
| Average increase (among those who foresee increase) | 11.1% | 13.1% | 18.7% |
| Second Quarter predictions from April, May, and June | | | |
| Foresee Decrease | 37.7% | 36.9% | 31.0% |
| Average decrease (among those who foresee decrease) | 10.9% | 9.6% | 7.8% |
| Foresee No Change | 27.2% | 29.2% | 38.3% |
| Foresee Increase | 35.1% | 33.8% | 30.7% |
| Average increase (among those who foresee increase) | 10.0% | 9.6% | 11.4% |



Property Manager Survey: 2nd Quarter 2006

| Bookings via third party website | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|----------------------------------|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Size of Hotel | | | | | | | | |
| <u>50 - 100 Rooms</u> | 12.4% | 10.8% | 10.7% | 15.1% | 18.8% | 17.1% | 14.3% | 15.9% |
| <u>101 + Rooms</u> | 12.6% | 11.0% | 13.5% | 13.2% | 10.4% | 11.2% | 8.0% | 8.7% |
| 101-219 | 14.9% | 13.3% | 15.5% | 15.8% | 11.5% | 11.2% | 9.1% | 9.7% |
| 220-500 | 4.9% | 4.8% | 5.4% | 4.6% | 7.0% | 13.2% | 2.6% | 5.3% |
| <u>All Properties</u> | 13.5% | 11.4% | 13.3% | 15.9% | 12.9% | 12.9% | 10.6% | 11.1% |



Hotel Visitor Survey



Methodology

Hotel Visitor Survey

Each month, approximately 250 self-administered surveys are completed among visitors staying at hotels throughout Palm Beach County. The hotels were selected according to size and geographic location to represent all hotels in the county.

Survey Changes

In October 2005, the visitors' survey was revised and updated to better address the Tourist Development Council needs in terms of tourist information.

The changes that were made and impact this report are as follows:

Multiple responses are now accepted for the question "Who made the decision to come to PBC?". Also, the responses 'Female head of household', 'Male head of household' and 'Other traveling companion' were merged into 'Head of household/Other Adult', and the response 'Family living in PBC' was added as an option.

- The question "Which of the following influenced your trip to PBC?" (Question 3) was combined with the question "Why did you choose to visit PBC over other destinations?" (Question 5). Due to this change some of the closed-end answers were revised, added or excluded as follows:

- 'Work related trip – did not have a choice in destination' and 'Work related trip – I had a choice in selecting destination' became 'Work related trip'.
- 'Convenient/inexpensive flights' changed to 'Convenient Flights'
- 'Travel Agency recommendation' changed to 'Travel Agency'



Methodology

Hotel Visitor Survey

Survey changes (continued):

- 'Cultural Activities' (Question 3) was merged with 'Arts and Cultural Event' (Question 5).
 - 'PBC CVB literature' now reads 'Palm Beach County Convention and Visitors Bureau information/website'.
 - 'Hotel brochure' was changed to 'Hotel brochure/website'.
 - 'Attractions brochure' changed to 'Attractions brochure/website'.
 - 'Saw an advertisement/promotion/article' (Question 3), 'Newspaper or magazine article' (Question 5), 'Newspaper or magazine advertisement' (Question 5) were combined into 'Media Coverage'.
 - 'Sporting event (other than Spring Training)' (question 5) was replaced with 'Attend a sporting event'.
 - The answer 'Internet information' was replaced with 'other Internet sources'.
 - The answers 'Bus Tour' and 'Spanish language media' were added.
- Multiple responses are now accepted for the question "How did you get here?". Also, responses of Bus and Train were added to the list.
- Side trips have been excluded from computation of visitors expenditures (no longer asked on survey).
- In order to obtain a more accurate estimate of lodging expenditures, visitors are now asked directly how much they are paying for their hotel room instead of how much their party spent with lodging per day and in total. The amount spent with lodging per day is then calculated by multiplying room rate x number of rooms rented x 10.5% sales taxes.
- Two new questions were added: "What would make your next visit better?" and "To what extent if at all, might the rising cost of transportation, due to rising fuel costs, influence your decision whether or not to visit Palm Beach County?"



Methodology

Hotel Visitor Survey

Survey changes (continued):

- Changes to the question “Which of the following activities did you enjoy while staying in PBC?” were as follows:

- The closed-end responses swimming, snorkeling, surfing, kite surfing, and ‘visit Downtown at the Gardens’ were added.
 - ‘Boating/fishing/diving’ are now presented individually and the answer ‘Other water activities’ was removed from the survey. Data from these two answers collected during October 2004 through September 2005 will be shown in all new related answers for comparison (i.e. prior responses of ‘boating/fishing/diving’ will now count toward the individual responses ‘boating’, ‘fishing’ and ‘diving’).
 - The response ‘cruise’ was changed to ‘Gambling cruise’ and ‘Pari-mutuels (racing, jai-alai)’ changed to ‘Pari-mutuels (dog track)’.
- The answer ‘Palm Beach County Convention and Visitors Bureau’ was added to the list of websites visitors might use to book hotel rooms.
- Visitors are now asked if they are of Hispanic origin or descent and the answer ‘Hispanic’ was removed from the ethnic group question.
- Age categories “18 to 24” and “25 to 34” were merged into “Under 35” and categories “35 to 44” and “45 to 54” were combined into “35 to 54”.
- Household income ranges “Under \$25,000” and “\$25,000 to \$44,999” were merged into “Under \$45,000”.
- The household size question is no longer on the survey.



Hotel Survey: 2nd Quarter 2006

| Characteristics of Stay | Total <u>2Q</u> 2006 | <u>April</u> | <u>May</u> | <u>June</u> | Total <u>2Q</u> 2005 | Total <u>3Q</u> 2005 | Total <u>4Q</u> 2005 | Total <u>1Q</u> 2006 |
|-------------------------|----------------------------|--------------|------------|-------------|----------------------------|----------------------------|----------------------------|----------------------------|
| Average Party Size * | 2.2 | 2.2 | 2.1 | 2.1 | 2.1 | 2.2 | 2.1 | 2.1 |
| Median Party Size | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 | 2.0 |
| Nights in County | 3.6 | 4.2 | 3.5 | 3.0 | 3.8 | 4.0 | 3.7 | 4.7 |
| Nights in Hotel | 3.4 | 3.9 | 3.5 | 2.9 | 3.7 | 3.9 | 3.4 | 4.4 |
| Rooms per Night * | 1.4 | 1.3 | 1.4 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 |

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Survey: 2nd Quarter 2006

| Visitor Expenditures | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|----------------|----------------|----------------|--------------|----------------|----------------|----------------|----------------|
| Average Expenditure Per Visit | | | | | | | | |
| Lodging | \$826 | \$1,162 | \$781 | \$580 | \$636 | \$566 | \$823 | \$1,461 |
| Restaurant/Bar | \$323 | \$371 | \$347 | \$247 | \$352 | \$347 | \$296 | \$519 |
| Gifts/Shopping | \$133 | \$191 | \$151 | \$58 | \$233 | \$125 | \$153 | \$158 |
| Entertainment/Recreation | \$31 | \$43 | \$25 | \$20 | \$85 | \$86 | \$48 | \$106 |
| Local Travel | \$143 | \$207 | \$133 | \$93 | \$167 | \$164 | \$139 | \$207 |
| Total Per Party | \$1,455 | \$1,973 | \$1,435 | \$998 | \$1,473 | \$1,287 | \$1,459 | \$2,451 |
| Average Expenditure Per Person Per Day (based on average # of persons per party) | | | | | | | | |
| Total Per Person | \$661 | \$897 | \$683 | \$475 | \$701 | \$585 | \$695 | \$1,167 |
| Total Per Person/Per Day | \$195 | \$230 | \$195 | \$164 | \$190 | \$150 | \$204 | \$265 |
| Lodging | \$110 | \$135 | \$106 | \$95 | \$82 | \$66 | \$115 | \$158 |
| Restaurant/Bar | \$43 | \$43 | \$47 | \$40 | \$45 | \$40 | \$41 | \$56 |
| Gifts/Shopping | \$18 | \$22 | \$20 | \$10 | \$30 | \$15 | \$21 | \$17 |
| Entertainment/Recreation | \$4 | \$5 | \$3 | \$3 | \$11 | \$10 | \$7 | \$11 |
| Local Travel | \$19 | \$24 | \$18 | \$15 | \$21 | \$19 | \$20 | \$22 |

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.



Hotel Survey: 2nd Quarter 2006

| Visitor Expenditures | <u>Pleasure</u> | | | | | | | |
|---|----------------------|----------------|----------------|----------------|----------------------|----------------------|----------------------|----------------------|
| | <u>Total 2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | <u>Total 2Q 2005</u> | <u>Total 3Q 2005</u> | <u>Total 4Q 2005</u> | <u>Total 1Q 2006</u> |
| Average Expenditure Per Visit | | | | | | | | |
| Lodging | \$1,051 | \$1,541 | \$923 | \$580 | \$788 | \$596 | \$821 | \$2,040 |
| Restaurant/Bar | \$449 | \$483 | \$475 | \$341 | \$475 | \$420 | \$292 | \$588 |
| Gifts/Shopping | \$269 | \$363 | \$300 | \$93 | \$427 | \$192 | \$277 | \$294 |
| Entertainment/Recreation | \$66 | \$83 | \$49 | \$62 | \$145 | \$136 | \$68 | \$126 |
| Local Travel | \$152 | \$221 | \$144 | \$68 | \$202 | \$164 | \$140 | \$270 |
| Total Per Party | \$1,993 | \$2,691 | \$1,892 | \$1,144 | \$2,037 | \$1,508 | \$1,598 | \$3,318 |
| Average Expenditure Per Person Per Day (based on average # of persons per party) | | | | | | | | |
| Total Per Person | \$687 | \$928 | \$701 | \$409 | \$784 | \$559 | \$615 | \$1,383 |
| Total Per Person/Per Day | \$176 | \$202 | \$184 | \$132 | \$178 | \$140 | \$171 | \$230 |
| Lodging | \$93 | \$116 | \$90 | \$67 | \$69 | \$55 | \$88 | \$142 |
| Restaurant/Bar | \$40 | \$36 | \$46 | \$39 | \$42 | \$39 | \$31 | \$41 |
| Gifts/Shopping | \$24 | \$27 | \$29 | \$11 | \$37 | \$18 | \$30 | \$20 |
| Entertainment/Recreation | \$6 | \$6 | \$5 | \$7 | \$13 | \$13 | \$7 | \$9 |
| Local Travel | \$13 | \$17 | \$14 | \$8 | \$18 | \$15 | \$15 | \$19 |

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.



Hotel Survey: 2nd Quarter 2006

| Visitor Expenditures | <u>Business</u> | | | | | | | |
|---|----------------------|----------------|----------------|--------------|----------------------|----------------------|----------------------|----------------------|
| | <u>Total 2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | <u>Total 2Q 2005</u> | <u>Total 3Q 2005</u> | <u>Total 4Q 2005</u> | <u>Total 1Q 2006</u> |
| Average Expenditure Per Visit | | | | | | | | |
| Lodging | \$704 | \$870 | \$706 | \$595 | \$554 | \$536 | \$828 | \$1,030 |
| Restaurant/Bar | \$257 | \$282 | \$264 | \$220 | \$287 | \$293 | \$304 | \$414 |
| Gifts/Shopping | \$65 | \$86 | \$50 | \$49 | \$132 | \$68 | \$63 | \$79 |
| Entertainment/Recreation | \$12 | \$16 | \$10 | \$9 | \$59 | \$46 | \$30 | \$82 |
| Local Travel | \$130 | \$182 | \$106 | \$102 | \$145 | \$167 | \$142 | \$154 |
| Total Per Party | \$1,169 | \$1,437 | \$1,135 | \$974 | \$1,178 | \$1,110 | \$1,366 | \$1,758 |
| Average Expenditure Per Person Per Day (based on average # of persons per party) | | | | | | | | |
| Total Per Person | \$687 | \$845 | \$668 | \$541 | \$693 | \$653 | \$804 | \$1,005 |
| Total Per Person/Per Day | \$222 | \$264 | \$202 | \$187 | \$210 | \$172 | \$244 | \$320 |
| Lodging | \$134 | \$160 | \$126 | \$114 | \$99 | \$83 | \$148 | \$187 |
| Restaurant/Bar | \$49 | \$52 | \$47 | \$42 | \$51 | \$45 | \$54 | \$75 |
| Gifts/Shopping | \$12 | \$16 | \$9 | \$9 | \$24 | \$11 | \$11 | \$14 |
| Entertainment/Recreation | \$2 | \$3 | \$2 | \$2 | \$11 | \$7 | \$5 | \$15 |
| Local Travel | \$25 | \$34 | \$19 | \$19 | \$26 | \$26 | \$25 | \$28 |

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.



Hotel Survey: 2nd Quarter 2006

| Planning the Trip to Palm Beach County | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Reason for Trip | | | | | | | | |
| Conference/Convention/ Business Meeting | 63.3% | 59.2% | 62.4% | 71.3% | 61.3% | 51.8% | 54.8% | 55.4% |
| - Business Meeting | 54.0% | 52.0% | 52.8% | 56.9% | 50.2% | 46.1% | 47.9% | 47.5% |
| - Conference/Convention | 7.3% | 4.0% | 8.0% | 13.8% | 10.3% | 5.4% | 5.1% | 6.9% |
| - Other Business | 2.0% | 3.2% | 1.6% | 0.7% | 0.8% | 0.3% | 1.8% | 1.1% |
| Vacation/Pleasure | 31.5% | 36.4% | 33.2% | 22.0% | 30.8% | 40.5% | 37.5% | 36.3% |
| Sporting Event | 1.8% | 2.0% | 0.8% | 2.6% | 3.1% | 0.9% | 3.1% | 5.2% |
| Cultural Event/Attraction | 0.5% | 0.4% | 0.8% | 0.4% | 0.4% | 0.5% | 0.3% | 0.0% |
| Film/TV location scouting/production | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| Other | 2.8% | 2.0% | 2.8% | 3.6% | 4.5% | 6.3% | 4.1% | 2.1% |
| Who Made the Decision | | | | | | | | |
| Employer | 62.7% | 58.5% | 64.0% | 67.7% | 52.4% | 46.3% | 53.3% | 54.9% |
| Head of Household/ Other adult | 31.8% | 37.3% | 27.6% | 28.0% | 45.1% | 51.7% | 38.9% | 41.1% |
| Family Living in PBC | 5.8% | 4.2% | 9.2% | 4.2% | N/A | N/A | 8.1% | 4.9% |
| Children Influenced Decision | 1.1% | 1.3% | 1.3% | 0.6% | 2.5% | 2.0% | 2.1% | 1.8% |
| Advanced Planning | | | | | | | | |
| One Month or Less | 56.6% | 58.5% | 55.0% | 55.5% | 52.6% | 56.7% | 50.5% | 50.6% |
| 2 to 3 Months | 24.8% | 23.2% | 27.9% | 23.0% | 22.6% | 20.9% | 26.1% | 24.3% |
| More than 3 Months | 18.5% | 18.3% | 17.1% | 21.5% | 24.8% | 22.4% | 23.4% | 25.1% |

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2006

| Planning the Trip to Palm Beach County (Continued) | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Reasons for Selecting Palm Beach County Over Other Destinations* | | | | | | | | |
| Work Related Trip | 61.6% | 58.2% | 63.1% | 65.0% | 61.3% | 52.1% | 53.4% | 55.9% |
| Visit Friends/Relatives | 19.1% | 23.6% | 18.7% | 14.0% | 17.3% | 24.1% | 25.2% | 21.1% |
| Previous Visit | 8.6% | 11.8% | 10.8% | 2.2% | 10.9% | 13.7% | 9.1% | 10.9% |
| Weather | 8.6% | 11.8% | 10.8% | 1.7% | 5.1% | 5.7% | 7.5% | 9.8% |
| Convenient Flights | 7.1% | 8.0% | 7.5% | 5.8% | 5.4% | 4.7% | 9.3% | 7.4% |
| Special Event | 6.9% | 4.2% | 7.5% | 9.9% | 14.1% | 11.1% | 6.5% | 4.4% |
| Beaches | 6.5% | 8.9% | 8.3% | 1.8% | 4.6% | 7.5% | 4.0% | 4.2% |
| Friends/Relatives recommendation | 4.1% | 5.1% | 4.1% | 2.4% | 11.4% | 17.3% | 2.9% | 3.5% |
| Golf/Tennis/Recreation | 3.0% | 3.0% | 2.9% | 2.7% | 3.0% | 4.3% | 2.8% | 5.5% |
| Hotel Brochure/Website | 1.5% | 2.1% | 1.7% | 0.3% | 3.5% | 4.6% | 1.4% | 0.6% |
| Art/Cultural Event | 1.0% | 0.8% | 1.2% | 1.1% | 1.0% | 1.2% | 0.3% | 1.3% |
| Attend Sporting Event | 0.9% | 1.7% | 0.4% | 0.4% | 2.6% | 1.0% | 2.1% | 2.7% |
| Attraction Brochure/Website | 0.8% | 0.8% | 0.8% | 0.4% | 1.1% | 1.1% | 0.6% | 0.5% |
| Compete in Sporting Event | 0.7% | 0.4% | 0.8% | 0.7% | 0.8% | 0.4% | 1.5% | 0.4% |
| Other Internet Sources | 0.5% | 0.0% | 0.8% | 0.4% | 3.5% | 7.3% | 1.0% | 0.7% |
| Spring Training | 0.4% | 0.4% | 0.8% | 0.0% | 0.3% | 0.0% | 0.2% | 1.6% |
| Travel Agency | 0.3% | 0.0% | 0.8% | 0.0% | 1.3% | 1.4% | 0.0% | 0.6% |
| Media Coverage | 0.2% | 0.4% | 0.0% | 0.0% | 1.7% | 3.6% | 0.0% | 0.1% |
| Bus Tour | 0.1% | 0.0% | 0.4% | 0.0% | N/A | N/A | 0.5% | 0.1% |
| PBC-CVB Information/Website | 0.1% | 0.4% | 0.0% | 0.0% | 0.4% | 1.2% | 0.1% | 0.1% |
| County/State Tourist Agency | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.1% |
| Spanish Language Media | 0.0% | 0.0% | 0.0% | 0.0% | N/A | N/A | 0.4% | 0.0% |
| Other | 3.3% | 3.0% | 2.1% | 4.7% | 11.7% | 12.0% | 5.7% | 5.1% |

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2006

| Planning the Trip to Palm Beach County (Continued) | <u>Total 2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | <u>Total 2Q 2005</u> | <u>Total 3Q 2005</u> | <u>Total 4Q 2005</u> | <u>Total 1Q 2006</u> |
|--|----------------------|--------------|------------|-------------|----------------------|----------------------|----------------------|----------------------|
| <u>Booked Trip with Travel Agency</u> | | | | | | | | |
| Yes | 25.6% | 24.7% | 27.0% | 24.8% | 21.7% | 24.6% | 21.4% | 26.1% |
| No | 74.4% | 75.3% | 73.0% | 75.2% | 78.3% | 75.4% | 78.6% | 73.9% |
| <u>Booked Any Part of Trip Using Internet</u> | | | | | | | | |
| Yes | 46.0% | 50.4% | 45.6% | 40.8% | 43.7% | 47.0% | 52.5% | 44.1% |
| No | 54.0% | 49.6% | 54.4% | 59.2% | 56.3% | 53.0% | 47.5% | 55.9% |
| <u>Booked Any Part of Trip Using Internet*</u> (among those who used the Internet) | | | | | | | | |
| Air | 74.2% | 80.2% | 67.9% | 71.6% | 76.1% | 72.7% | 78.3% | 79.2% |
| Hotel | 61.3% | 60.3% | 59.6% | 61.6% | 65.8% | 65.6% | 54.6% | 55.2% |
| Hotel website | 27.6% | 30.6% | 23.9% | 26.2% | 31.4% | 31.5% | 28.7% | 31.8% |
| Expedia | 4.2% | 2.5% | 7.3% | 2.9% | 3.9% | 7.1% | 4.0% | 2.6% |
| Travelocity | 3.9% | 2.5% | 3.7% | 5.5% | 1.3% | 2.4% | 1.5% | 1.0% |
| Orbitz | 2.1% | 3.3% | 0.9% | 1.7% | 3.6% | 2.7% | 1.8% | 2.0% |
| hotels.com | 1.3% | 0.8% | 1.8% | 0.7% | 2.0% | 2.9% | 1.8% | 1.2% |
| Hotwire | 0.3% | 0.0% | 0.0% | 0.7% | 0.3% | 0.0% | 0.3% | 0.3% |
| PBC CVB Website | 0.3% | 0.8% | 0.0% | 0.0% | N/A | N/A | 0.0% | 0.0% |
| Other Website | 4.5% | 5.8% | 3.7% | 3.0% | 2.6% | 5.1% | 3.8% | 4.5% |
| Don't Remember | 17.1% | 14.0% | 18.3% | 21.0% | 20.7% | 14.0% | 12.5% | 11.7% |
| Car Rental | 40.3% | 50.4% | 34.9% | 31.6% | 43.6% | 43.7% | 43.2% | 38.7% |
| Tickets to Event | 1.0% | 0.8% | 1.8% | 0.0% | 1.0% | 1.2% | 0.7% | 2.0% |
| Other | 5.6% | 2.5% | 7.3% | 12.9% | 1.6% | 2.7% | 4.6% | 3.6% |
| <u>Visit was Part of Package</u> (that may have included airfare, lodging, meals, rental car, etc.) | | | | | | | | |
| Yes | 10.1% | 14.0% | 7.8% | 10.6% | 11.7% | 12.4% | 11.7% | 10.3% |
| No | 89.9% | 86.0% | 92.2% | 89.4% | 88.3% | 87.6% | 88.3% | 89.7% |
| <u>Type of Transportation**</u> | | | | | | | | |
| Airplane | 80.1% | 84.7% | 80.6% | 76.3% | 72.8% | 69.1% | 83.5% | 81.8% |
| Car | 24.2% | 22.9% | 21.1% | 27.8% | 26.8% | 30.7% | 23.8% | 23.9% |
| Other | 1.1% | 1.6% | 1.2% | 0.4% | 0.3% | 0.2% | 1.0% | 0.8% |

* Multiple responses accepted. **Multiple responses accepted starting in October 2005.



Hotel Survey: 2nd Quarter 2006

| Characteristics of the Visit | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Plan to Return to PBC | | | | | | | | |
| Yes | 82.0% | 80.6% | 82.2% | 82.5% | 82.0% | 82.0% | 80.8% | 78.1% |
| No | 3.1% | 0.8% | 4.9% | 3.3% | 3.7% | 3.5% | 3.5% | 3.2% |
| Don't know | 14.9% | 18.5% | 13.0% | 14.1% | 14.3% | 14.5% | 15.6% | 18.7% |
| If no, why not? | | | | | | | | |
| Going to other places/I like changing destinations | 24.1% | N/A | 25.0% | 20.2% | N/A | N/A | N/A | N/A |
| No business in the area | 23.3% | N/A | 16.7% | 32.4% | N/A | N/A | N/A | N/A |
| Had unpleasant business experience | 4.8% | N/A | 0.0% | 12.2% | N/A | N/A | N/A | N/A |
| Family moving away | 4.8% | N/A | 8.3% | 0.0% | N/A | N/A | N/A | N/A |
| No reason/No answer | 42.9% | N/A | 50.0% | 35.2% | N/A | N/A | N/A | N/A |
| When do you plan on returning to PBC? | | | | | | | | |
| Within the next 3 months | 30.4% | 31.0% | 33.5% | 25.8% | 28.4% | 31.8% | 34.7% | 26.2% |
| Within the next 6 months | 12.2% | 8.0% | 10.8% | 16.8% | 14.7% | 13.8% | 9.5% | 8.1% |
| Within the next year | 22.3% | 25.5% | 24.1% | 15.4% | 22.3% | 23.5% | 18.2% | 30.4% |
| Within the next few years | 7.1% | 6.0% | 5.4% | 11.3% | 10.7% | 9.6% | 5.9% | 10.1% |
| Don't Know | 27.9% | 29.5% | 26.1% | 30.6% | 23.8% | 21.3% | 31.7% | 25.3% |
| Influence of fuel cost | | | | | | | | |
| 5 – Strong consideration | 5.6% | 5.3% | 5.8% | 5.3% | N/A | N/A | 5.2% | 6.6% |
| 4 | 4.2% | 4.0% | 3.8% | 7.0% | N/A | N/A | 5.2% | 5.2% |
| 3 | 8.1% | 11.0% | 6.7% | 8.2% | N/A | N/A | 12.6% | 10.5% |
| 2 | 7.0% | 6.6% | 6.3% | 7.4% | N/A | N/A | 8.6% | 6.6% |
| 1 – No consideration at all | 51.5% | 52.9% | 51.2% | 48.1% | N/A | N/A | 49.3% | 56.3% |
| I don't make the decision | 23.5% | 20.3% | 26.3% | 23.9% | N/A | N/A | 19.1% | 14.7% |
| Influence of generally increasing costs (May and June only) | | | | | | | | |
| 5 – Strong consideration | 5.3% | N/A | 5.6% | 4.7% | N/A | N/A | N/A | N/A |
| 4 | 5.2% | N/A | 5.1% | 6.8% | N/A | N/A | N/A | N/A |
| 3 | 10.1% | N/A | 11.1% | 10.1% | N/A | N/A | N/A | N/A |
| 2 | 8.5% | N/A | 8.1% | 8.6% | N/A | N/A | N/A | N/A |
| 1 – No consideration at all | 44.7% | N/A | 42.4% | 45.3% | N/A | N/A | N/A | N/A |
| I don't make the decision | 26.2% | N/A | 27.8% | 24.4% | N/A | N/A | N/A | N/A |

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2006

| Characteristics of the Visit | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| <u>Main Destination</u> | | | | | | | | |
| Palm Beach County | 91.3% | 88.4% | 92.6% | 93.7% | 93.2% | 90.4% | 89.4% | 90.6% |
| <u>First Trip to PBC</u> | | | | | | | | |
| | 26.9% | 22.4% | 29.4% | 29.7% | 27.2% | 27.8% | 22.4% | 26.7% |
| <u>Description of Travel Party*</u> | | | | | | | | |
| Adult family members or friends | 38.2% | 41.1% | 41.5% | 37.2% | 43.6% | 43.0% | 44.6% | 47.4% |
| Self Only | 33.0% | 30.5% | 32.6% | 33.2% | 32.2% | 31.1% | 28.7% | 28.8% |
| Business Associates | 28.0% | 25.0% | 27.1% | 29.4% | 21.8% | 22.2% | 25.5% | 23.7% |
| Children <12 years of age | 8.1% | 10.6% | 5.1% | 7.3% | 8.6% | 11.5% | 9.3% | 5.0% |
| Grandchildren <12 years of age | 0.3% | 0.0% | 0.4% | 0.3% | 0.8% | 0.8% | 1.3% | 0.3% |



Hotel Survey: 2nd Quarter 2006

| Characteristics of the Visit (Continued) | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Participation in Specific Activities* | | | | | | | | |
| Restaurants | 93.0% | 93.4% | 91.0% | 94.9% | 94.9% | 93.1% | 91.5% | 92.4% |
| Shopping | 33.5% | 34.9% | 37.1% | 27.7% | 36.9% | 38.9% | 40.0% | 38.9% |
| Went to Beach | 30.7% | 33.6% | 33.0% | 24.8% | 33.8% | 36.8% | 25.3% | 26.3% |
| Swimming | 24.2% | 27.1% | 25.8% | 17.3% | 12.9%** | 13.6%** | 12.8% | 11.7% |
| Bars/Nightclubs | 13.2% | 12.2% | 13.6% | 16.2% | 13.5% | 17.0% | 12.4% | 12.5% |
| Visited downtown West Palm Beach Attractions/City Place | 12.2% | 12.7% | 15.8% | 8.3% | 7.3% | 14.2% | 8.7% | 12.1% |
| Golf, Tennis | 8.7% | 10.5% | 8.1% | 6.6% | 9.8% | 12.1% | 10.5% | 18.8% |
| Visited Mizner Park/Boca Raton | 8.3% | 10.9% | 10.4% | 3.0% | 7.4% | 8.4% | 7.5% | 9.7% |
| Visited downtown Delray Beach Attractions | 7.7% | 8.7% | 10.9% | 4.0% | 8.5% | 11.4% | 7.8% | 8.6% |
| Visited Wildlife Refuge | 3.9% | 5.2% | 3.6% | 3.4% | 2.9% | 3.0% | 3.4% | 3.7% |
| Museums, Art galleries | 3.8% | 4.4% | 3.6% | 3.8% | 3.1% | 4.0% | 3.0% | 6.8% |
| Attractions | 3.4% | 4.8% | 4.1% | 2.2% | 4.3% | 4.2% | 3.1% | 3.3% |
| Boating | 3.2% | 3.5% | 2.7% | 2.4% | 12.9%** | 13.6%** | 1.7% | 1.8% |
| Performing Arts (plays, concerts, dance) | 2.0% | 0.9% | 3.2% | 1.8% | 1.9% | 1.6% | 1.5% | 3.0% |
| Visited downtown Lake Worth | 1.9% | 2.6% | 2.3% | 0.7% | 0.8% | 1.4% | 1.4% | 2.2% |
| Attended a Sporting Event | 1.8% | 3.5% | 0.9% | 1.1% | 1.4% | 0.4% | 2.4% | 3.6% |
| Visited Downtown at the Gardens | 1.7% | 0.4% | 4.1% | 0.8% | N/A | N/A | 1.7% | 2.8% |
| Visited Riviera Beach/Singer Island | 1.5% | 0.0% | 1.4% | 3.0% | 0.7% | 1.3% | 1.4% | 1.8% |
| Snorkeling | 1.2% | 0.0% | 2.3% | 1.9% | 12.9%** | 13.6%** | 0.5% | 1.0% |
| Diving | 1.0% | 0.9% | 0.9% | 1.1% | 12.9%** | 13.6%** | 0.1% | 0.3% |
| Fishing | 0.9% | 1.3% | 0.5% | 0.8% | 12.9%** | 13.6%** | 1.7% | 1.8% |
| Gambling Cruise | 0.7% | 0.0% | 0.5% | 1.7% | 1.9% | 1.7% | 1.8% | 0.7% |
| Competed in Sports Event | 0.6% | 0.4% | 0.9% | 0.3% | 1.2% | 0.7% | 1.2% | 0.9% |
| Palm Beach County Convention Center | 0.4% | 0.9% | 0.0% | 0.4% | 0.0% | 0.3% | 0.0% | 0.4% |
| Surfing | 0.3% | 0.4% | 0.0% | 0.4% | 12.9%** | 13.6%** | 0.4% | 0.6% |
| Pari-mutuels (dog-track) | 0.1% | 0.0% | 0.5% | 0.0% | 0.3% | 0.7% | 0.3% | 0.4% |
| Kite Surfing | 0.0% | 0.0% | 0.0% | 0.0% | 12.9%** | 13.6%** | 0.1% | 0.2% |
| Other | 5.6% | 4.4% | 5.0% | 7.0% | 8.4% | 5.4% | 4.8% | 7.6% |

*Multiple responses accepted.

** Represents combined data from the old closed-end answers: 'boating/fishing/diving' and 'other water activities'



Hotel Survey: 2nd Quarter 2006

| Attitudes about Trip to Palm Beach County | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Things Liked Best – Top Mentions | | | | | | | | |
| Climate/Weather | 35.1% | 44.6% | 31.1% | 27.9% | 36.1% | 22.1% | 41.9% | 49.5% |
| Beaches/Ocean | 12.3% | 10.8% | 12.6% | 13.5% | 11.3% | 16.4% | 10.0% | 7.9% |
| Beautiful Area/Nice Place | 6.0% | 6.2% | 8.4% | 3.1% | 10.0% | 11.2% | 6.3% | 5.6% |
| Relaxing Atmosphere | 4.8% | 2.1% | 5.3% | 6.7% | 1.9% | 3.0% | 2.3% | 2.7% |
| Cleanliness | 4.7% | 4.6% | 4.2% | 5.1% | 4.2% | 4.1% | 3.6% | 3.2% |
| Nice People | 4.0% | 1.5% | 6.3% | 3.9% | 4.5% | 5.7% | 4.2% | 4.2% |
| Hotel | 4.0% | 2.6% | 1.6% | 11.4% | 3.1% | 6.6% | 3.7% | 3.7% |
| Visiting Friends/Relatives | 4.0% | 4.1% | 3.7% | 4.0% | 3.4% | 6.0% | 5.8% | 3.2% |
| Restaurant | 3.6% | 2.1% | 4.2% | 4.2% | 1.4% | 3.5% | 2.6% | 1.9% |
| Everything | 3.3% | 3.6% | 3.7% | 2.6% | 3.0% | 1.4% | 3.4% | 1.4% |
| Golf | 1.9% | 3.1% | 1.1% | 2.8% | 1.9% | 1.6% | 1.5% | 1.8% |
| Shopping | 1.6% | 1.0% | 2.6% | 0.5% | 3.5% | 1.6% | 1.7% | 1.1% |
| Palm Trees | 1.4% | 2.1% | 1.6% | 0.5% | 0.5% | 1.6% | 1.4% | 0.5% |
| Convenience | 1.4% | 1.5% | 0.0% | 2.6% | 0.8% | 1.1% | 0.9% | 1.6% |
| Location | 1.0% | 1.0% | 2.1% | 0.0% | 2.2% | 2.1% | 0.3% | 0.8% |
| Other | 10.7% | 9.0% | 11.4% | 10.8% | 12.7% | 12.5% | 10.3% | 11.1% |



Hotel Survey: 2nd Quarter 2006

| Attitudes about Trip to Palm Beach County | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Things Liked Least – Top Mentions | | | | | | | | |
| Traffic/Bad Drivers | 36.5% | 39.3% | 37.4% | 31.5% | 32.9% | 23.3% | 33.4% | 40.2% |
| Humidity/Poor Weather | 19.0% | 15.9% | 14.6% | 27.4% | 22.0% | 19.7% | 17.5% | 9.7% |
| Expensive | 5.1% | 5.6% | 4.1% | 6.8% | 6.9% | 5.3% | 5.2% | 4.7% |
| Crowded | 3.9% | 4.7% | 3.3% | 3.9% | 2.7% | 2.7% | 1.5% | 4.0% |
| Hotel (general) | 3.0% | 4.7% | 4.1% | 0.5% | 2.4% | 2.1% | 3.4% | 2.6% |
| Unfriendly People | 3.0% | 3.7% | 2.4% | 3.0% | 1.8% | 1.8% | 1.2% | 0.5% |
| Road Construction | 2.9% | 1.9% | 4.1% | 2.5% | 3.0% | 2.9% | 3.6% | 3.8% |
| Stay Was Too Short | 1.1% | 0.0% | 1.6% | 1.7% | 1.5% | 1.8% | 3.5% | 2.2% |
| Cost of Hotel | 0.6% | 1.9% | 0.0% | 0.0% | 0.0% | 0.3% | 1.1% | 3.8% |
| Lack of Directional Signs | 0.5% | 0.0% | 1.6% | 0.0% | 1.5% | 1.8% | 1.2% | 2.1% |
| Other | 15.8% | 13.8% | 17.6% | 12.3% | 18.3% | 16.8% | 17.6% | 15.2% |
| <u>Nothing liked least</u> | 9.2% | 8.4% | 8.9% | 10.5% | 7.2% | 22.1% | 10.7% | 11.6% |



Hotel Survey: 2nd Quarter 2006

| Attitudes about Trip to Palm Beach County | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|---|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Suggestions for Improvement - Top Mentions | | | | | | | | |
| Longer stay | 21.2% | 20.2% | 19.8% | 23.2% | N/A | N/A | 17.2% | 18.4% |
| Better weather | 11.4% | 16.7% | 12.8% | 3.0% | N/A | N/A | 12.2% | 18.0% |
| Improve traffic/Finish Construction on I-95 | 11.3% | 11.9% | 9.3% | 12.0% | N/A | N/A | 9.1% | 10.0% |
| Less business and more partying/more free time | 9.3% | 4.8% | 14.0% | 8.4% | N/A | N/A | 4.5% | 1.5% |
| Come during vacation time | 6.3% | 10.7% | 1.2% | 7.4% | N/A | N/A | 7.8% | 5.8% |
| Come with friends/family | 4.8% | 6.0% | 7.0% | 0.0% | N/A | N/A | 0.3% | 3.7% |
| Lower prices | 2.7% | 2.4% | 1.2% | 8.4% | N/A | N/A | 2.0% | 1.9% |
| Cheaper hotel | 1.7% | 2.4% | 1.2% | 1.5% | N/A | N/A | 0.0% | 4.8% |
| Better hotel | 1.6% | 2.4% | 1.2% | 1.0% | N/A | N/A | 5.0% | 4.6% |
| Move here/ Buy a house here | 1.4% | 0.0% | 3.5% | 0.0% | N/A | N/A | 0.0% | 0.0% |
| Rent a car | 1.3% | 1.2% | 0.0% | 3.0% | N/A | N/A | 0.0% | 0.0% |
| More flights/ More direct flights | 1.2% | 0.0% | 3.5% | 0.0% | N/A | N/A | 0.8% | 0.0% |
| Nothing | 8.5% | 7.1% | 4.7% | 17.1% | N/A | N/A | 13.9% | 9.3% |
| Other | 18.2% | 16.8% | 21.5% | 16.4% | N/A | N/A | 27.1% | 22.5% |



Hotel Survey: 2nd Quarter 2006

| Characteristics of Visitors | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|-----------------------------|---------------|-------|-------|-------|---------------|---------------|---------------|---------------|
| Age | | | | | | | | |
| Under 35 | 18.5% | 18.1% | 21.1% | 15.8% | 15.2% | 18.8% | 16.4% | 14.5% |
| 35 to 54 | 57.3% | 57.8% | 54.5% | 57.8% | 59.2% | 57.8% | 53.4% | 49.8% |
| 55 to 64 | 18.2% | 17.3% | 19.5% | 19.9% | 17.1% | 18.0% | 23.4% | 21.4% |
| 65 + | 6.0% | 6.8% | 4.9% | 6.5% | 8.5% | 5.4% | 6.8% | 14.2% |
| Occupation | | | | | | | | |
| Professional/Managerial | 60.2% | 65.2% | 61.0% | 54.3% | 56.4% | 53.4% | 65.3% | 60.7% |
| Sales | 16.4% | 14.3% | 14.9% | 21.4% | 15.0% | 14.9% | 16.5% | 12.4% |
| Technical | 8.8% | 9.8% | 6.2% | 9.6% | 5.5% | 7.7% | 5.7% | 5.2% |
| Retired | 7.3% | 6.1% | 8.7% | 7.2% | 9.0% | 7.0% | 8.1% | 15.9% |
| Student | 1.3% | 1.6% | 1.2% | 0.8% | 0.4% | 1.6% | 0.8% | 1.8% |
| Other | 6.1% | 2.9% | 7.9% | 6.7% | 13.7% | 15.3% | 3.6% | 4.0% |
| Hispanic Origin | 6.7% | 5.3% | 4.5% | 9.9% | N/A | N/A | 5.5% | 2.3% |
| Ethnicity | | | | | | | | |
| White/Caucasian | 91.8% | 92.9% | 91.3% | 91.3% | 92.4% | 90.8% | 93.1% | 94.4% |
| African-American/Black | 4.9% | 4.6% | 4.8% | 5.1% | 4.8% | 6.5% | 3.2% | 3.1% |
| Asian | 2.8% | 2.5% | 3.5% | 2.3% | 2.3% | 2.5% | 3.1% | 2.6% |
| Other | 0.6% | 0.0% | 0.4% | 1.3% | 0.3% | 0.2% | 0.6% | 0.0% |



Hotel Survey: 2nd Quarter 2006

| Characteristics of Visitors (Continued) | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|--|------------------|-------|-------|-------|------------------|------------------|------------------|------------------|
| Income | | | | | | | | |
| Under \$45,000 | 3.3% | 3.7% | 2.9% | 3.5% | 5.5% | 6.6% | 3.2% | 3.3% |
| \$45,000 to \$64,999 | 10.7% | 7.3% | 11.9% | 12.5% | 7.9% | 10.9% | 7.7% | 7.9% |
| \$65,000 to \$99,999 | 21.3% | 22.0% | 20.5% | 21.1% | 21.3% | 21.9% | 22.0% | 19.4% |
| \$100,000 to \$200,000 | 42.3% | 38.5% | 46.7% | 42.5% | 41.9% | 37.8% | 40.7% | 40.0% |
| Over \$200,000 | 22.4% | 28.4% | 18.1% | 20.3% | 23.4% | 22.9% | 26.4% | 29.4% |
| Gender | | | | | | | | |
| Male | 59.7% | 57.3% | 60.0% | 62.3% | 57.1% | 56.6% | 54.7% | 58.2% |
| Female | 40.3% | 42.7% | 40.0% | 37.7% | 42.9% | 43.4% | 45.3% | 41.8% |



Hotel Survey: 2nd Quarter 2006

| Place of Origin | Total 2Q 2006 | April | May | June | Total 2Q 2005 | Total 3Q 2005 | Total 4Q 2005 | Total 1Q 2006 |
|------------------------------|-------------------------|--------------|--------------|--------------|-------------------------|-------------------------|-------------------------|-------------------------|
| <u>Domestic</u> | 90.8% (n=671) | 92.3% | 89.9% | 90.9% | 92.2% (n=687) | 90.1% (n=664) | 88.7% (n=648) | 92.2% (n=680) |
| Southeast | 18.3% (n=136) | 16.3% | 20.6% | 19.2% | 16.2% (n=121) | 16.6% (n=122) | 18.3% (n=134) | 17.3% (n=128) |
| Florida | 18.1% (n=134) | 11.4% | 16.9% | 25.2% | 20.6% (n=153) | 23.4% (n=172) | 14.5% (n=106) | 12.3% (n=91) |
| Midwest | 14.3% (n=106) | 16.7% | 14.5% | 11.6% | 16.0% (n=119) | 12.6% (n=93) | 15.2% (n=111) | 17.3% (n=128) |
| Mid Atlantic | 12.6% (n=93) | 18.7% | 11.3% | 7.0% | 12.2% (n=91) | 13.0% (n=96) | 14.2% (n=104) | 16.8% (n=124) |
| New York | 11.9% (n=88) | 13.0% | 12.1% | 10.7% | 10.5% (n=78) | 9.9% (n=73) | 12.6% (n=92) | 15.0% (n=110) |
| Far West | 8.8% (n=65) | 6.9% | 8.1% | 13.4% | 8.5% (n=63) | 7.3% (n=54) | 8.0% (n=58) | 4.9% (n=36) |
| New England | 6.8% (n=50) | 9.3% | 6.5% | 3.7% | 8.1% (n=60) | 7.2% (n=53) | 5.9% (n=43) | 8.5% (n=63) |
| <u>International</u> | 9.2% (n=68) | 7.7% | 10.1% | 9.1% | 7.8% (n=58) | 9.9% (n=73) | 11.3% (n=83) | 7.8% (n=58) |
| Europe (net) | 4.5% (n=34) | 4.5% | 5.6% | 3.2% | 4.0% (n=30) | 4.5% (n=33) | 6.8% (n=50) | 3.8% (n=28) |
| - England/UK | 2.3% (n=17) | 3.3% | 2.4% | 1.2% | 2.3% (n=17) | 3.2% (n=23) | 3.2% (n=23) | 1.7% (n=13) |
| - Germany | 0.4% (n=3) | 0.4% | 0.8% | 0.0% | 0.5% (n=4) | 0.4% (n=3) | 1.2% (n=9) | 1.2% (n=9) |
| Latin America / Caribbean | 2.0% (n=15) | 0.8% | 2.4% | 2.6% | 1.1% (n=8) | 3.1% (n=23) | 1.6% (n=12) | 0.7% (n=5) |
| Canada | 1.6% (n=12) | 1.6% | 0.8% | 2.1% | 2.4% (n=18) | 1.6% (n=12) | 1.9% (n=14) | 2.7% (n=20) |
| Australia/Asia | 0.8% (n=6) | 0.4% | 0.8% | 1.2% | 0.0% (n=0) | 0.1% (n=1) | 0.5% (n=4) | 0.1% (n=1) |
| Middle East | 0.3% (n=2) | 0.4% | 0.4% | 0.0% | 0.3% (n=2) | 0.4% (n=3) | 0.4% (n=3) | 0.5% (n=4) |
| Africa | 0.0% (n=0) | 0.0% | 0.0% | 0.0% | 0.0% (n=0) | 0.1% (n=1) | 0.0% (n=0) | 0.0% (n=0) |



Hotel Survey: 2nd Quarter 2006

| Pleasure Vs. Business By Selected Place of Origin | <u>2Q 2006</u> | <u>April</u> | <u>May</u> | <u>June</u> | <u>Total 2Q 2005</u> | <u>Total 3Q 2005</u> | <u>Total 4Q 2005</u> | <u>Total 1Q 2006</u> |
|---|----------------|--------------|--------------|--------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <u>Southeast</u> | 18.3% | 16.3% | 20.6% | 19.2% | 16.2% | 16.6% | 18.3% | 17.3% |
| Business | 14.6% | 11.8% | 16.9% | 16.0% | 11.1% | 10.9% | 13.4% | 12.5% |
| Pleasure | 3.7% | 4.1% | 3.6% | 3.3% | 4.8% | 5.6% | 4.8% | 4.7% |
| <u>Florida</u> | 18.1% | 11.4% | 16.9% | 25.2% | 20.6% | 23.4% | 14.5% | 12.3% |
| Business | 13.9% | 8.9% | 13.7% | 18.5% | 14.6% | 12.6% | 9.4% | 8.9% |
| Pleasure | 4.1% | 2.4% | 2.8% | 6.6% | 5.6% | 10.4% | 4.9% | 3.3% |
| <u>Midwest</u> | 14.3% | 16.7% | 14.5% | 11.6% | 16.0% | 12.6% | 15.2% | 17.3% |
| Business | 9.2% | 9.8% | 9.7% | 8.6% | 11.3% | 6.9% | 7.3% | 11.0% |
| Pleasure | 5.1% | 6.9% | 4.8% | 3.3% | 4.7% | 5.7% | 7.6% | 6.0% |
| <u>Mid Atlantic</u> | 12.6% | 18.7% | 11.3% | 7.0% | 12.2% | 13.0% | 14.2% | 16.8% |
| Business | 5.8% | 9.3% | 4.4% | 3.7% | 4.4% | 4.9% | 6.3% | 7.3% |
| Pleasure | 6.6% | 8.9% | 6.9% | 3.3% | 7.4% | 7.9% | 7.9% | 9.5% |
| <u>New York</u> | 11.9% | 13.0% | 12.1% | 10.7% | 10.5% | 9.9% | 12.6% | 15.0% |
| Business | 4.2% | 3.7% | 4.0% | 5.3% | 4.7% | 3.3% | 4.3% | 4.7% |
| Pleasure | 7.7% | 9.3% | 8.1% | 5.3% | 5.8% | 6.6% | 8.1% | 10.2% |
| <u>Far West</u> | 8.8% | 6.9% | 8.1% | 13.4% | 8.5% | 7.3% | 8.0% | 4.9% |
| Business | 7.4% | 6.5% | 5.6% | 12.3% | 6.6% | 4.6% | 5.7% | 3.9% |
| Pleasure | 1.4% | 0.4% | 2.4% | 1.2% | 1.9% | 2.7% | 2.3% | 0.9% |
| <u>New England</u> | 6.8% | 9.3% | 6.5% | 3.7% | 8.1% | 7.2% | 5.9% | 8.5% |
| Business | 2.7% | 4.9% | 1.6% | 1.6% | 3.9% | 3.5% | 2.2% | 3.8% |
| Pleasure | 3.7% | 4.5% | 4.4% | 1.6% | 4.2% | 3.7% | 3.7% | 4.7% |